SUMMARY OF THE
ON-SITE ASSESSMENT COMMITTEE MEETING
FEBRUARY 14, 2001

The On-site Assessment Committee of the National Environmental Laboratory Accreditation Conference (NELAC) met by teleconference on Wednesday, February 14, 2001, at 1:00 p.m. Eastern Standard Time (EST). The meeting was led by its chair, Mr. William Ingersoll of the U.S. Navy. A list of action items resulting from the meeting is given in Attachment A. A list of participants is given in Attachment B. Appendix B-1 is given in Attachment C. *The purpose of the meeting was to discuss Appendix B-1 and to address other items of importance as they were raised during the meeting.*

INTRODUCTION

After welcoming participants, Mr. Ingersoll informed the committee that the meeting's primary subject for discussion would be the most recent revision of Appendix B-1. He directed the committee's attention to a December 20, 2000, version of the appendix and asked Mr. Jack Hall, who had chaired the Appendix B subcommittee, to lead the discussion of Appendix B-1.

APPENDIX B-1

Discussion of Appendix B-1 began with an introductory question by Mr. Ingersoll. Noting that the On-site Assessment Committee will not be developing technical checklists for assessors, he asked where technical checklists would be covered in assessor training. In response, Mr. Hall noted that Appendix B-2 had been developed to define the basic elements by which a method must be evaluated and to serve as a guide to help assessors develop their own checklists. There was some discussion of whether Appendix B-1 should require a review of example checklists in the technical training courses. Although it was agreed that the committee's goal is to ensure that technical training courses produce good assessors and that an optional review of example checklists could be beneficial, the majority of the committee was uncomfortable with requiring checklists to be defined or presented in assessor training courses.

The committee reviewed Appendix B-1 paragraph-by-paragraph. There was some discussion of the use of the word "technology" in Appendix B-1. It was suggested that the wording be changed to "testing" with the rationale that "technology" is not defined in NELAC. The committee noted that the assessor checklist used by the state of Florida is organized by technology but includes method-specific requirements within technology sections. It was suggested that the concept of technology is what the committee wants to promote and that "technology" should be defined in the NELAC Standard before Appendix B-1 is referenced. Committee members were in general agreement that "technology" should be defined in Chapter 3 (On-site Assessment). There was also discussion of whether it should be defined in Chapter 1 (Program Policy and Structure). Mr. Ingersoll reminded the committee that the deadline for submitting proposed changes to other chapters had already passed. It was noted that the committee can propose a change from the floor at the next annual NELAC meeting if they have prepared the recommended language by that time.

In discussion of the introduction, it was noted that a technical training course should be slanted to the fact that the assessor will be performing an assessment based on what is taught in the course. The committee made a clear distinction between assessor and operator.

There was moderate discussion of including analytical software in technical training courses. Although it was suggested that there are too many types of software to cover in a short course, the majority of the committee members felt that software associated with instrumentation should be included with the basic principles of the instrumentation.

There was also moderate discussion of quality control (QC) procedures with a distinction between unacceptable QC results and inappropriate QC procedures. There was related discussion of unethical conduct.

APPENDIX B-2

With little time remaining, the committee revisited the modified version of Appendix B-2 that had been distributed after their last (February 2) teleconference to give committee members who had not been present on that teleconference an opportunity to comment. There was discussion of the scope of Appendix B-2. Mr. Alfredo Sotomayor noted an apparent shift in focus in the middle of the document from critical performance elements of a test method to review of a standard operating procedure (SOP). The committee questioned the purpose of Appendix B-2. Is its purpose a checklist for an assessor reviewing and evaluating a laboratory's SOP, or a training standard for an assessor evaluating the application of the SOP to the critical performance elements of a test method? It was noted that Chapter 5 of the NELAC Standard (Quality Systems) already provides information about what must be included in an SOP. Committee members agreed that they could see where there might be confusion regarding Appendix B-2 versus Chapter 5 information on SOPs and in-house methods manuals. Members of the committee suggested that the scope of Appendix B-2 should include verifying the SOP, verifying that it is being appropriately implemented, and verifying that what is observed being implemented is reflected in the laboratory's records. Mr. Sotomayor agreed to prepare draft language expanding the scope of Appendix B-2 and to distribute the draft language for discussion at the committee's next teleconference.

MISCELLANEOUS BUSINESS

Ms. Mimi Uhlfelder informed the committee that she would establish contact with her Appendix C subcommittee in the coming week. Since the subcommittee has not received any additional accrediting authority SOPs, they are moving ahead with the three SOPs that they have on hand.

CONCLUSION

The allotted time for the teleconference having expired, the meeting was adjourned at 2:30 p.m. EST. The committee's next meeting will be on Friday, March 2, 2001, via teleconference.

Attachment A

ACTION ITEMS
ON-SITE ASSESSMENT COMMITTEE MEETING
FEBRUARY 14, 2001

Item No.	Action	Responsible Member	Date to be Completed
1.	Committee will review draft language expanding the scope of Appendix B-2 to be distributed before their next teleconference.	A. Sotomayor	03/02/01
2.	Appendix C subcommittee will establish contact.	M. Uhlfelder	03/02/01

Attachment B

PARTICIPANTS
ON-SITE ASSESSMENT COMMITTEE MEETING
FEBRUARY 14, 2001

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APPENDIX B-1
Standards for Technical Training Courses for Assessors

The purpose of the technical training courses is to ensure consistency of technical knowledge among the NELAC assessors. Prerequisites for the training course for the assessor are:

- Completing the Basic Assessor Training
- Basic knowledge of the technology, i.e. familiarity with the principles and application of the technology used by the laboratory
- Understanding of Quality Systems

The technical courses must concentrate on the elements and details of the technology and/or methods that are critical to assuring that the laboratory is implementing an analytical technique properly.

Technical training courses provided to meet the requirements defined in Section 3.2.3 of the NELAC standard and must address the elements listed below. Assessor technical training courses must also focus on how to review these elements during the on-site assessment. The skills obtained during these training courses must also enable assessors to evaluate quality systems components present in the laboratory, as they relate to technical disciplines, to ensure compliance with the NELAC standards.

Technical training courses must provide or identify:

- Basic theoretical and operating principles of the analytical technology, and associated instrumentation and software.
- Critical steps and processes of the analytical technology or technique that must be executed to ensure quality data, including critical quality control (QC) measures and QC criteria to be met for a performance-based measurement systems (PBMS) method based on the technology.
- Major sources of error, and how to control them, for the analytical technology or technique.
- Inappropriate procedures or practices for the analytical technology or technique.
- Key information required to document completely the reported results.
- Essential elements for assessing data generated.
- Ways to detect improper practices.
- Exercises in the evaluation of raw data to reported results.

The training course must also include an examination covering the material presented to ensure an understanding of the above elements.

APPENDIX B-1
Standards for Technical Training Courses for Assessors

The assessors successfully completing the course shall have acquired the following:

- Knowledge of the technology sufficient to assess its proper use by the laboratory.
- An understanding as to how the technology is used in the various methods.
- An understanding of the key elements of data packages and raw data to review and check effectively.